

## Attachment

### **STATEMENT OF QUALIFICATIONS SUBMITTAL FORMAT**

Division of Facilities Construction & Management

#### GENERAL INSTRUCTIONS

- !** *Use this **2000** edition of the Attachment to help develop responses for your firm's Statement of Qualifications (SOQ). The Attachment has been revised. The SOQ brochure you submit will be used for Screening purposes.*
- !** *Limit written pages to 35 with an additional 10 pages for photos and graphics. Any submittal that exceeds this page limitation will be disqualified. Cover, index and dividers are not counted.*
- !** *Provide seven (7) copies of your Statement of Qualifications.*
- !** *List all consultants to be included in basic services. Consultants listed will be expected to be a part of the Design Team.*
- !** *List any consultants you propose beyond the basic services. They are subject to justification, review, and approval by DFCM. Please state whether or not special consultants will require additional fees.*
- !** *Be aware that during the interview process of the short-listed firms, persons who will be the day-to-day responsible individuals will be retained for additional discussion after the firm's presentation. Principals will be excused if not involved with the project on a day-to-day basis.*
- !** *Do not contact the project agency during the proposal stage.*
- !** *Provide questions about the project to the Program Director before or at Pre-Submittal Information Meeting. Questions submitted prior to Pre-Submittal Meeting must be in writing.*

**One-page Preview/Overview of Items Requested in the**  
**STATEMENT of QUALIFICATIONS Submittal**

**I. SUMMARY STATEMENT:**

*Provide a summary statement which describes the specialized experience and project approach of the Project Team members.*

**II. SPECIFIC PROJECT TYPE EXPERIENCE:**

*Provide information on projects similar to the project being pursued which the Project Team members have executed. If project was done while member of another firm, please so indicate.*

**III. PROPOSED PROJECT TEAM:**

*Provide a chart which identifies the function (tasks) of the Primary individuals on the proposed Project Team during each phase of the work.*

**IV. PRIOR EXPERIENCE WORKING TOGETHER AS A PROPOSED TEAM:**

*Relate individual experience working together on prior project.*

**V. INDIVIDUAL EXPERIENCE:**

*Demonstrate overall background and experience of each individual on the Project Team. Indicate hours available to service project.*

**VI. COMPOSITION OF FIRMS:**

*Provide a general background of each firm on the project team.*

**VII. REFERENCES - PAST YEAR:**

*Provide for each Project Team firm the references for whom work has been performed during the past year.*

**VIII. REFERENCES - PAST FIVE YEARS:**

*Provide for each Project Team firm the references for whom work has been performed during the past five years. (Where available, DFCM evaluation forms will be used to help determine past performance.)*

**IX. FIRM LOCATION:**

*Identify the primary firm and all firms which will be a part of the Project Team and the location of their offices. The primary firm office is the firm or office receiving 75% or more of fees.*

**NOTE:**        **The following pages contain further details as well as examples on the above items.** The italic style of print continues to indicate *instructions and comments*.



**I. SUMMARY STATEMENT:**

- *Provide the summary statement from Primary Firm.*
- *Identify any projects programmed but not built as such.*
- *Describe specialties of your project team, teaming approach, and your approach to this particular project.*

**Example:**

Acme Architects have provided program services of various sizes throughout the western United States for 14 library facilities (13 of which were built).

Three of the libraries were over 200,000 square feet.

Acme Architects created the angle-aisle arrangement in stack areas that are now used in many other libraries.

Daylighting in reading and stack areas is a hallmark of all libraries designed by ACME Architects.

Two school libraries were designed in a configuration of several circles, with entrances adjoining all major hallways. Special acoustical design allowed for maximum privacy and minimum noise.

## II. SPECIFIC PROJECT TYPE EXPERIENCE

### Example:

DESIGN FIRM: ACME Architects, Inc.

PROJECT: Bullwinkle Memorial Library

OWNER: Butte County, Texas

REFERENCE: Commissioner Jon Adams (214) 555-1212

PROGRAM REQUIREMENTS: Provide new library building including entry, checkout area, stack space, five (5) offices, work room.

BUILDING GROSS AREA: 54,000 GSF

BID DATE: 3 August 1992

COST CONTROL: BUDGET: \$4,500,000 BID AMOUNT: \$4,385,000

CHANGE ORDERS: AMOUNT: % OF CONST. COST:

|                 |          |      |
|-----------------|----------|------|
| Owner initiated | \$52,100 | 2.6% |
| A/E initiated   | \$19,489 | 1.0% |
| Total:          | \$72,589 | 3.7% |

FINAL TOTAL PROJECT COST: \$87.58/SF

SCHEDULE CONTROL: ESTIMATED TIME: ACTUAL TIME:

|                        |          |              |
|------------------------|----------|--------------|
| Programming            | 5 months | 4 3/4 months |
| S.D. through Bid Phase | 9 months | 8 1/2 months |

CONSULTANTS:

|                          |                          |
|--------------------------|--------------------------|
| DEF Structural Engineers | MNO Acoustical Engineers |
| GHI Mechanical Engineers | XYZ Cost Estimators      |
| JKL Electrical Engineers | Premium Library Consult. |

CONTRACTOR: Dudley Whipple, Inc.

### INDIVIDUALS WITH **PRIMARY** RESPONSIBILITIES ON THIS PROJECT:

| PERSON:        | POSITION:           | SD | DD | CD | BID | CA | OTHER |
|----------------|---------------------|----|----|----|-----|----|-------|
| Jim Bob Acme   | Principal In Charge | !  | !  | !  | !   | !  |       |
| Billy Bob Acme | Project Architect   | !  | !  | !  | !   | !  |       |

|      |     |      |                  |   |   |   |   |
|------|-----|------|------------------|---|---|---|---|
| Buff | Bob | Acme | Project Designer | ! | ! | ! |   |
| Joe  | Bob | Acme | Architect        |   | ! | ! | ! |

### **III. PROPOSED PROJECT TEAM:**

- *Provide a graphic chart which shows how the proposed design team will be organized, the responsibilities of each team member firm, and responsibilities for each individual included on each firm team. (Note: If more than one firm of the same discipline is to be used for the same task, indicate the percent of work to be performed by each firm.)*

Example and worksheet on following pages.





Example:

[illegible]

Example:

[illegible]

Example:

[illegible]

Example:

[illegible]

Example:

**V. INDIVIDUAL EXPERIENCE:**

-- *Provide one sheet for each person who will be involved with project.*

Example:

NAME OF INDIVIDUAL: Jim Bob Acme

FIRM NAME: Acme Architect Inc.

POSITION TITLE ON  
THIS PROJECT: Project Architect

AVAILABILITY TO  
SERVICE PROJECT: Hours available to service project next 12 months -  
1044 hours

EDUCATION: MFA, University of Tanganyika - 1984

LICENSES/REGISTRATIONS/  
CERTIFICATES WITH YEAR: Architect: Utah, 1965 and  
Architect: Delaware, 1980

PROFESSIONAL ORGS.: American Institute of Architects

EMPLOYMENT HISTORY: Perfect Plans, SLC 1962-1969  
DEF Architects, SLC 1965-1979  
PLANS-R-US, Dover 1980-1987

**WORK EXPERIENCE RELATIVE TO THIS PROJECT:**

| PROJECT NAME            | RESPONSIBILITY    | FIRM            | DATE |
|-------------------------|-------------------|-----------------|------|
| Lodge Expansion Library | Project Architect | PLANS-R-US      | 1980 |
| Library Conf. Facility  | Project Architect | Acme Architects | 1988 |
| Moore Community Library | Project Architect | Acme Architects | 1990 |

**OTHER WORK EXPERIENCE:**

| PROJECT NAME      | RESPONSIBILITY    | FIRM           | DATE |
|-------------------|-------------------|----------------|------|
| Jones High School | Project Architect | PLANS-R-US     | 1986 |
| Lake Fire Station | Project Architect | DEF Architects | 1978 |

AWARDS/PUBLISHED WORK: Honor Award - Utah Heritage Foundation 1985  
Merit Award - Utah Society AIA 1987

Example:

OTHER PERTINENT  
INFORMATION:

Mr. Acme's expertise is in the design and construction of libraries. He was instrumental in the creation of the angle-aisle arrangement in stack areas that are now used in many other libraries. He is also an expert in the fast-track construction process, as proposed for this project.

Example:

## **VI. COMPOSITION OF FIRMS:**

Example:

|   | A/E FIRM:       | STRUCT.<br>ENG: | MECH.<br>ENG: | ELEC.<br>ENG: | COST<br>ESTI-<br>MATOR: |
|---|-----------------|-----------------|---------------|---------------|-------------------------|
| FIRM NAME:  | Acme            | Sky-Hi          | Ambience      | Well-Lit      | On-Target               |
|   | Architects Inc. | Eng.            | Eng. Inc.     | Eng. Co.      | Costs                   |
| AGE OF FIRM:  | 20 years        | 10 years        | 5 years       | 8 years       | 4 years                 |
| AVERAGE NUMBER<br>OF EMPLOYEES OVER<br>PAST FIVE YEARS: | 12              | 8               | 10            | 5             | 5                       |
| PRESENT NUMBER<br>OF EMPLOYEES:                         | 15              | 10              | 12            | 6             | 2                       |
| COMPOSITION<br>OF STAFF:                                |                 |                 |               |               |                         |
| Licensed Professionals                                  | 5               | 5               | 6             | 3             | 0                       |
| CAD Draftspeople  | 3               | 3               | 3             | 1             | 0                       |
| Specification Writer                                    | 2               | 1               | 2             | 1             | 0                       |
| Administrative  | 5               | 1               | 1             | 1             | 2                       |

\*See individuals on chart.

## **VII. REFERENCES FOR SERVICES PERFORMED DURING PAST YEAR:**

Example:

| PROJECT                              | CLIENT                           | POSITION | TELEPHONE      |
|--------------------------------------|----------------------------------|----------|----------------|
| Emerald Towers<br>Emerald City, Oz   | Dorothy Gale<br>Wizard Inc.      | Owner    | (801) 555-5555 |
| Daily Planet Bldg.<br>Metropolis, UT | Perry White<br>Daily Planet Inc. | Editor   | (801) 555-6666 |

Example:

**VIII. REFERENCES FOR SERVICES PERFORMED DURING PAST FIVE YEARS:**

Example:

| PROJECT  | CLIENT                                | POSITION       | TELEPHONE      |
|--|---------------------------------------|----------------|----------------|
| Wayne Mansion<br>Gotham, UT                        | Bruce Wayne<br>Wayne Inc.             | Caped Crusader | (801) 555-7777 |
| B-25 Hanger<br>H.A.F.B., UT                        | Captain John Yossarian<br>U.S.A.A.C.  | Pilot          | (801) 555-8888 |
| Clark Residence<br>Langley, VA.                    | John Kelly<br>Clark Investment Assoc. | Owner          | (202) 555-9999 |
| Bullwinkle<br>Memorial Library<br>Butte County, TX | Arlen Winkle<br>Winkle Memorial Inc.  | Director       | (604) 555-9898 |

**IX. FIRM LOCATION:**

Example:

DISTANCE FROM OFFICE  
TO PROJECT SITE:

12 Miles

PRIMARY FIRM:

Acme Architects  
21 Baker Street  
Salt Lake City, UT 84100  
(Tel.) 555-8163

CONSULTANTS:

Sky-Hi Structural Engineering  
Salt Lake City, Utah  
(Tel.) 555-0921

Ambience Mechanical Engineers  
Draper, Utah  
(Tel.) 555-7777

Well-Lit Electrical Engineering Co.  
Salt Lake City, Utah  
(Tel.) 555-8990



Example:

MNO Civil Engineers  
Magna, Utah  
(Tel.) 555-0221

SPECIAL CONSULTANTS: STU Library Consultants  
East Jerusalem, Vermont  
(tel) 345-555-7842

VWX Acoustical Consultants  
Hearing, West Virginia  
(Tel.) 301-555-6231

-- *Please note that the special consultants selected are subject to justification, review and approval of DFCM.*

**IV. PRIOR EXPERIENCE WORKING TOGETHER AS A PROPOSED TEAM**